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SUBJ: BRAZIL'S 1976/77 COFFEE HARVEST

REF: FEB 14 TELECON MCCONNELL/MEARS

SUMMARY. ALL INFORMATION AVAILABLE TO AGATT SUPPORTS A 1976/77 MINAS GERAIS COFFEE HARVEST OF 4.5-5.0 MILLION BAGS. LATEST IBC ESTIMATE OF MINAS GERAIS PRODUCTION IS 2.3 MILLION BAGS. CONGENRIO IS SENDING SEPARATE MESSAGE REGARDING BRAZIL'S COFFEE STOCKS. END SUMMARY.

1. AS USDA REQUESTED, AGATT HAS REVIEWED ALL AVAILABLE INFORMATION REGARDING MINAS GERAIS 1976/77 COFFEE CROP. DIFFERENCE BETWEEN FAS PRODUCTION ESTIMATE 5 MILLION BAGS (60 KILOGRAM) FOR MINAS GERAIS AND IBC ESTIMATE 2.3 MILLION BAGS ACCOUNTS FOR MOST OF DIFFERENCE BETWEEN FAS CROP ESTIMATE OF 9.5 MILLION BAGS AND IBC ESTIMATE OF 6.0 MILLION BAGS FOR TOTAL BRAZIL 1976/77 COFFEE CROP.

2. IN AUG. 1975 J. PHILLIP ROURK, EXPERIENCED COFFEE GROWER AND FAS COFFEE CONSULTANT, VISITED ALL COFFEE PRODUCING LIMITED OFFICIAL USE

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AREAS OF BRAZIL TO ASSESS DAMAGE FROM JULY, 1975 FROSTS. LEON YALLOUZ, AGATT OFFICE COFFEE EXPERT, ACCOMPANIED FOURK. YALLOUZ HAS BEEN DRAFTING FAS COFFEE REPORTS FOR 18 YEARS AND VISITS ALL COFFEE AREAS THREE TIMES EACH YEAR. EDMOND MISSIAEN, ASST. AGATT, ALSO ACCOMPANIED ROURK AND YALLOUZ ON PART OF THIS TRIP. ROURK HAD VISITED BRAZIL'S COFFEE AREAS SEVERAL TIMES PRIOR TO AUG. 1975 TRIP.

3. UPON COMPLETION OF AUG. 1975 TRIP, ROURK PROVIDED INFORMATION CONTAINED IN USDA PRESS RELEASE DATED AUG. 21, 1975. THE FOLLOWING STATEMENT WAS CONTAINED IN THAT RELEASE QUOTE DAMAGE IN MINAS GERAIS WAS MINIMAL END QUOTE. ROURK INCLUDED DETAILS OF HIS CROP SURVEY IN A FOREIGN AGRICULTURE MAGAZINE ARTICLE DATED SEPT. 22, 1975 IN WHICH HE STATED QUOTE IN MINAS GERAIS, THE THIRD MOST IMPORTANT COFFEE STATE, ONLY SLIGHT DAMAGE WAS NOTED, PRIMARILY TO THE LOWER ROWS OF TREES ON HILLSIDES OR OTHER AREAS WHERE COLD AID TENDED TO SETTLE END QUOTE. IN THAT SAME ARTICLE ROURK MADE A PRELIMINARY 1976/77 PRODUCTION FORECAST OF 8-11 MILLION BAGS.

4. AGATT AGREED WITH ROURK'S AUG. 1975 ASSESSMENT AND STATED IN BB-5042 DATED SEPT. 5, 1975 QUOTE COFFEE TREES IN SOUTHWEST MINAS GERAIS ARE IN EXCELLENT VEGETATIVE CONDITION WITH MINIMAL AND INSIGNIFICANT FROST EFFECTS END QUOTE.

5. IN DEC. 1975 AGATT STAFF AGAIN VISITED COFFEE AREAS. IN BB-6001 DATED JAN. 9, 1976 THE REPORTING OFFICER STATED QUOTE COFFEE TREES IN SOUTHWEST MINAS GERAIS CONTINUE IN EXCELLENT CONFIDITION. WE ESTIMATE TOTAL COFFEE PRODUCTION IN MINAS GERAIS AT BETWEEN 4 AND 5 MILLION BAGS END QUOTE. IN A FOREIGN AGRICULTURE MAGAZINE ARTICLE DATED JAN. 12, 1976 ROURK ESTIMATED TOTAL BRAZIL 1976/77 PRODUCTION AT 9 TO 10.5 MILLION BAGS.

6. IN APRIL 1976 LESLIE HURT, FAS COFFEE SPECIALIST, AND AGATT STAFF AGAIN VISITED ALL COFFEE AREAS. IN HIS TRIP REPORT HURT STATED QUOTE THE STATE OF MINAS DID NOT SUFFER FROM THE FROST. MOST ALL THE COFFEE IN MINAS WAS LUSH AND GREEN AND THE TREES LIMITED OFFICIAL USE

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WERE LOADED WITH BERRIES. THE 1976/77 CROP MAY APPROACH 5 MILLION BAGS END QUOTE. THESE FINDINGS WERE PUBLISHED IN A FOREIGN AGRICULTURE MAGAZINE ARTICLE DATED MAY 3, 1976 AND IN USDA PRESS RELEASE DATED APRIL 28, 1976.

7. AFTER JULY 1975 FROST THE IBC MADE AN EXTENSIVE SURVEY OF THE DAMAGE AND ANNOUNCED THAT 10 PERCENT OF THE COFFEE TREAS IN MINAS GERAIS WERE DAMAGED. THE IBC HAS MAINTAINED THIS 10 PERCENT DAMAGED FIGURE SINCE ORIGINAL RELEASE. MAJOR COVER ARTICLE ON COFFEE SITUATION CARRIED BY FEB. 7, 1977 ISSUE OF LEADING WEEKLY NEWS MAGAZINE VISAO STATES 10 PERCENT OF TREES IN MINAS GERAIS WERE DAMAGED BY FROST. C(COPY OF ARTICLE AIRPOUCHED TODAY.)

8. IN APRIL 1976 RIGHT BEFORE THE HARVEST WAS BEGUN, THE IBC ANNOUNCED IN BELO HORIZONTE, CAPITAL OF MINAS GERAIS, THAT 1976/77 PRODUCTION IN MINAS GERAIS WOULD BE ABOUT 4.9 MILLION BAGS. THIS INFORMATION WAS CARRIED IN THE RIO DAILY "O GLOBO" APRIL 25, 1976. AGATT UNABLE TO EXPLAIN WHY IBC SUBSEQUENTLY REDUCED

PRODUCTION IN MINAS GERAIS TO 2.3 MILLION BAGS.

9. AGATT HAS REVIEWED RAINFALL AND OTHER WEATHER DATA FOR COFFEE AREAS OF MINAS GERAIS FOR PERIOD JULY 1975 TO MAY 1976. RAINFALL IN THESE AREAS WAS WELL BELOW NORMAL IN AUGUST AND SEPTEMBER 1975 BUT WAS CLOSE TO NORMAL FOR REMAINDER OF THIS PERIOD. AVERAGE PER HECTARE YIELDS OF RICE AND CORN IN VICINITY MINAS GERAIS COFFEE AREAS IN 1976 EXCEEDED 1975 LEVELS AND WERE IN LINE WITH LONG TERM TRENDS INDICATING NO SERIOUS ADVERSE WEATHER CONDITIONS AFFECTING THOSE CROPS BETWEEN OCTOBER 1975 AND MARCH 1976 REFLECTED GENERALLY GOOD GROWING CONDITIONS SINCE THE PREVIOUS HARVEST.

10. AGATT COFFEE PRODUCTION REPORTS BETWEEN SEPT. 1975 AND MAY 1975 CONTAIN INFORMATION SUPPORTING ROURK AND HURT FORECASTS OF COFFEE PRODUCTION. COFFEE HARVEST BEGAN SOON AFTER HURT VISIT. ALL INFORMATION AVAILABLE TO AGATT SUPPORTS A 1976/77 MINAS LIMITED OFFICIAL USE

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GERAIS PRODUCTION OF 4.5 TO 5.0 MILLION BAGS.

11. AT AGATT REQUEST CONGENRIO OFFICERS DISCUSSED BRAZIL'S COFFEE STOCK SITUATION WITH IBC OFFICIALS FEB. 14. SEPARATE MESSAGE BEING PREPARED BY CONGENRIO ON STOCK SITUATION. CRIMMINS

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